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Foreign Crops and MARKETS

VOLUME 56 NUMBER 14

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FOR RELEASE

MONDAY

APRIL 5, 1948

RARY
SERIAL RECORD
APR 13 1948

Issued by the OFFICE OF FOREIGN AGRICULTURAL RELATIONS
UNITED STATES DEPARTMENT OF AGRICULTURE, WASHINGTON, D.C.

LATE NEWS

The original proposal of the United States Brazil nut importers requiring 95 percent sound nuts has been revised. It is now proposed that the basis be 93 percent.

The importers also offer to amend their original proposal so that they may be allowed to reject shipments only when sound nuts are less than 90 percent. This is a reduction of 2 percent from the original proposal. The importers, however, are unwilling to change their original proposal regarding the opening of letters of credit for only 90 percent of invoice until the final check on outturn weight and quality has been established.

The Brazil nut exporters in Belem have decided they can guarantee only 92 percent sound nuts and that they will not accept less than 95 percent of the invoice value of the shipment. They contend that the above reply to the American proposals is all that they can do and still remain in business.

In the meantime, shipments from interior points to Belem have totalled only about 7,200 short tons of unshelled nuts which is less than half of normal for this time of year. In Manaos the situation is even worse, with estimates of receipts from the interior being less than 20 percent of normal. On the basis of receipts in the two principal export centers to date, it appears doubtful that even the small forecast (19,300 tons) of a month ago will be reached. As a consequence, the supply of Brazil nuts in the United States market this season will be decidedly limited.

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The British cheese ration will be cut from 2 to 1 1/2 ounces weekly on April 4. No change will occur in the special 12-ounce ration for certain classes of heavy workers.

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Supplementing the summary on world hog numbers published in the March 22, 1948 issue of Foreign Crops and Markets, the Office of Foreign Agricultural Relations has received information from Canada that the 1946 hog numbers were revised downward to 5,459,000 head, and December 1, 1947 numbers are reported at 5,381,000 head.

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WORLD CATTLE NUMBERS MAINTAINED 1/

World cattle numbers on January 1, 1948 are estimated at 724 million head, about 100,000 head more than in the preceding year. Significant decreases in North America, South America and western Europe were more than offset by increases in the Soviet Union and Oceania. The present numbers are only slightly below the 5-year 1936-40 average of 726.4 million head, which was relatively high compared with earlier periods.

At the beginning of 1948, North America had about 110 million head, about 3.2 million fewer cattle than in 1947. Europe and South America, with over 93 and nearly 117 million head, respectively, had about 800,000 and 700,000 less cattle. The Soviet Union, on the other hand, had over 3 million more cattle and Asia, Africa and Oceania, with moderate increases, had 1.5 million more cattle than a year earlier.

In North America, South America and Europe, cattle numbers decreased principally because of the unfaverable supply of grain and feed crops which in turn were in part responsible for heavy marketings of cattle in 1947. At the same time, the increase in cattle numbers in the Soviet Union reflects a rebuilding of herds after extensive war losses as well as good grain and feed crops. The improved feed position in Asia, Africa and Oceania also favored expansion in 1947.

Significant changes in cattle numbers have occurred in the various regions of the world between the 1936-40 period and the beginning of 1948. During this period, cattle numbers in North America increased by 13 million head, South America by 11 million head and Africa and Oceania by 5.8 and 0.8 million head, respectively. But, in the same period and as a result of the war, cattle numbers in Europe dropped by 9.2 million head, Soviet Union by 10 million head, and Asia by 14 million head. The total decreases for the period were slightly larger than the total increases, so that a net world decrease of over 2 million head took place.

During 1947 cattle numbers decreased principally in United States, western Europe, and some of the South American countries. In the United States, marketings during the year were heavy because of a tight feed situation, strong consumer demand, and high prices received by farmers. In many of the western European countries, a general feed shortage, further augmented by the drought in the latter part of last summer, resulted in considerable liquidation of cattle. Several of the South American countries, because of strong domestic and foreign demand, experienced heavy marketings and slaughter.

Restoration of cattle numbers in many of the countries will require several years of more than average supplies of feed. Other countries, with relatively low numbers, could materially increase cattle numbers by adopting improved feeding and breeding practices, better management practices and disease control methods. An increasing world population with its increasing consumer demand for beef puts an unusually heavy drain on the cattle resources of the world.

This is one of a series of regularly scheduled reports on world agricultural production prepared by the Office of Foreign Agricultural Relations Committee on Foreign Crop and Livestock Statistics. For this report, the Committee was composed of J. A. Becker, Chairman, C. M. Purves, Elmer A. Reese, Hazel B. Kefauver, Karen J. Friedman, Mary E. Long, Constance H. Farnworth.

1/ A more extensive statement may be obtained from the Office of Foreign Agricultural Relations.

CATTLE: Numbers in specified countries
averages 1931-1935 and 1936-40, annual 1943-1948

Continent and Country	Month of estimate 1/	Average		1943	1944	1945	1946	1947 2/	1948 2/
		1931-35	1936-40						
		Thousands	Thousands	Thousands	Thousands	Thousands	Thousands	Thousands	Thousands
North America:									
Canada	Dec. 1 1/	3/ 8,250	8,246	8,834	9,506	10,258	9,961	9,016	8,950
Costa Rica		400	366	413	437	464	-	-	506
El Salvador	July	520	680	673	779	-	650	686	-
Guatemala	July	409	520	729	657	-	-	-	-
Honduras	July	611	524	-	702	-	849	-	-
Mexico	June	4/ 10,083	3/ 11,716	-	5/ 12,000	-	-	12,900	-
Nicaragua		4/ 800	4/ 700	-	800	-	-	-	-
United States	Jan. 1	68,465	66,706	81,204	85,334	85,573	82,434	81,207	78,564
Cuba	Dec. 31 1/	4,340	5,024	4,897	4,500	4,236	6/ 4,136	-	4,000
Dominican Republic		3/ 906	3/ 885	-	-	-	597	-	1/ 500
Estimated total		95,900	96,600	-	116,800	117,900	114,700	112,500	109,600
Europe:									
Albania 7/		393	3/ 413	-	-	-	371	-	-
Austria	Dec. 3 1/	4/ 8/2,349	3/ 2,600	2,505	2,530	2,536	2,187	2,206	2,158
Belgium	Jan. 1	1/ 1,793	1/ 1,724	1,407	1,392	1,440	1,539	1,652	1,588
Bulgaria 7/ 9/	Dec. 31 1/	10/ 1,873	3/ 1,822	2,112	2,050	1,950	1,900	2,005	-
Czechoslovakia 7/ 11/	Jan. 1	-	3/ 4,475	4,383	4,358	4,239	4,143	3,941	-
Denmark	Dec. 31 1/	2,997	3,108	2,760	2,933	3,036	12/ 3,094	12/ 3,004	12/ 2,668
Eire	June	4,059	4,021	4,136	4,246	4,211	4,146	3,950	-
Finland	Mar. 1	13/ 1,792	13/ 1,850	1,721	1,867	1,694	1,673	1,560	-
France	Fall 1/	15,616	15,504	14/ 16,282	14/ 14,997	14/ 13,960	14/ 14,273	15,100	15,089
Germany 15/	Dec. 1 1/	-	3/ 16,050	15,215	15,700	-	13,693	14,020	13,250
Greece 7/	Dec. 31	937	3/ 1,041	-	-	520	570	600	-
Hungary 7/	Spring	1,759	1,905	2,338	2,167	16/ 1,070	16/ 1,104	1,406	-
Italy	July	4/8/ 7,090	8/ 7,571	-	-	6,550	6,900	7,700	-
Luxembourg	Dec. 1 1/	3/ 101	3/ 108	121	129	105	111	117	-
Netherlands	May	3/ 2,734	2,693	2,058	2,190	2,277	2,410	2,367	2,300
Norway	June	1,323	1,390	1,250	1,280	1,270	1,267	1,225	-
Poland 17/	June 30	-	4/ 10,106	-	-	-	6,600	-	-
Portugal	Dec. 31 1/	10/ 905	10/ 905	1,040	1,020	1,000	950	-	-
Rumania 7/ 18/	Dec. 31 1/	19/ 3,709	19/ 3,709	-	-	3,100	3,227	-	-
Spain	Dec. 31 1/	3/ 4,011	4/ 3,739	4,152	4,173	4,100	3,808	-	-
Sweden	Summer	3,025	2,959	2,790	2,859	2,843	2,870	2,790	-
Switzerland	April	1,636	1,663	1,517	1,497	1,461	1,472	1,451	1,400
United Kingdom	June	8,462	8,798	9,259	9,501	9,616	9,629	9,567	-
Yugoslavia 7/	Dec. 31 1/	3,911	4,181	-	-	-	-	-	-
Estimated total		20/107,100	102,400	-	94,700	91,800	91,300	94,000	93,200
Soviet Union 17/	Jan. 1	-	4/ 59,800	-	-	-	47,000	46,800	-
Asia:									
Iran	March	2,167	3/ 2,797	-	-	-	5/ 2,500	2,500	2,500
Iraq 7/ 21/	Spring	310	3/ 374	484	466	-	-	-	-
Palestine	Spring	4/ 160	4/ 169	243	-	-	-	-	-
Turkey 7/ 21/	Dec. 31 1/	5,584	7,177	8,278	7,821	7,950	8,210	8,091	-
Burma 7/	Dec. 31 1/	6,226	6,165	4,843	4,298	-	-	4,500	-
Ceylon 7/	Dec. 31 1/	1,617	1,618	1,710	1,650	1,550	1,620	-	-
China 22/	May	3/ 25,000	24,000	-	22,500	22,000	22,500	22,800	-
India 7/	Dec. 31 1/	198,474	205,751	-	200,000	200,000	-	-	-
Japan	Dec. 31 1/	1,512	1,803	2,389	2,419	-	2,318	1,990	-
Formosa 7/	Dec. 31 1/	384	354	312	325	310	300	-	-
Korea	Dec. 31 1/	1,649	3/ 1,698	1,780	1,790	-	1,030	1,150	-
Netherlands Indies 7/	Dec. 31 1/	8,084	7,669	-	-	-	-	-	-
Philippine Islands 7/	Jan. 1	3,493	23/ 4,268	-	-	-	-	2,800	-
Siam 7/	Mar. 31	10,047	11,303	12,787	11,051	-	-	-	-
Estimated total 24/		272,400	283,200	-	270,200	265,000	266,700	268,500	-

South America:										
Argentina	July	3/ 31,540	3/ 33,762	-	33,500	34,010	34,000	34,500	34,800
Bolivia	Dec. 31 1/	4/ 2,064	3/ 1,921	2,445	-	-	-	3,039	-
Brazil	Sept.	3/ 44,003	3/ 40,807	5/ 42,500	42,700	44,613	46,358	46,000	45,000
Chile	June	3/ 2,426	2,489	2,391	2,311	2,348	2,397	2,338	-
Colombia	Dec. 31 1/	3/ 7,730	3/ 8,010	10,934	11,456	12,334	13,000	-	-
Ecuador		3/ 1,370	3/ 1,300	1,120	1,200	1,150	-	-	-
Paraguay	Dec. 31 1/	3,383	3/ 3,259	3,500	3,300	3,300	3,500	3,400	-
Uruguay	May	4/ 7,372	4/ 8,297	-	1/ 6,256	-	6,834	7,000	-
Estimated total		104,900	105,600	-	109,900	113,600	116,900	117,300	116,600
Africa:									
Algeria	Mar. 1	879	837	893	896	850	1/ 843	-	1/ 1,000
Anglo-Egyptian Sudan		1,790	3/ 2,700	-	-	-	-	3,195	-
Kenya	July	5,209	3/ 5,239	-	-	4,300	-	-	-
Tanganyika	Dec. 31 1/	5,182	5,000	5,888	5,944	5,745	6,007	-	-
Egypt 7/	March	1,768	3/ 2,021	25/ 2,203	2,200	25/ 2,329	-	-	-
French Morocco 21/	Dec. 31 1/	1,994	1,973	2,675	2,749	2,679	2,102	-	1,800
Madagascar 21/	Dec. 31 1/	6,380	5,172	5,934	5,957	5,913	5,941	5,806	-
Mozambique	Dec. 31 1/	516	548	527	556	574	585	-	-
Northern Rhodesia	Dec. 31 1/	480	618	643	655	688	702	-	-
Angola		3/ 1,750	3/ 990	1,031	1,080	1,120	-	-	-
Southern Rhodesia	Dec. 31 1/	2,616	2,340	2,680	2,743	2,872	2,913	2,905	-
Spanish Morocco		3/ 283	259	311	324	290	223	250	-
Tunisia	Dec. 31 1/	523	494	553	529	501	500	401	-
Union of South Africa	Aug.	10,497	11,636	13,068	13,100	12,900	12,697	12,600	-
Estimated total		60,500	60,700	-	67,200	67,100	66,900	66,100	-
Oceania:									
Australia	Mar. 31	1/ 12,685	1/ 13,285	14,005	14,184	14,133	13,878	13,427	13,800
New Zealand	Jan. 31	4,188	4,449	4,485	4,476	4,628	4,704	4,671	4,700
Estimated total		17,500	18,100	-	19,100	19,200	19,000	18,500	18,900
Estimated world total		695,200	726,400	-	718,400	717,900	722,500	723,900	-

Office of Foreign Agricultural Relations. Prepared or estimated from official statistics, United States foreign service reports, and other information. Data relate to prewar boundaries, unless otherwise noted. Totals include estimates for countries for which official statistics are unavailable.

1/ End of year estimates (October to December) included under following year for comparisons and totals. Thus for Canada the December 1, 1942 estimate of 8,834,000 is shown under 1943. 2/ Preliminary. 3/ Average for 2 to 4 years only. 4/ Census or estimate for single year. 5/ Unofficial estimate. 6/ Census, July 1, 1946. 7/ Data include buffaloes. 8/ March. 9/ Includes Southern Dobrudja, beginning 1943, years 1944-46 have been adjusted to make a comparable series. 10/ Census, December 31, 1934. 11/ Present territory - excludes Sub-Carpathian Russia. 12/ Includes also number of cattle in parishes and boroughs, which totaled 53,000 head in 1946 and 50,000 head in 1947. 13/ September. 14/ Official statistics plus an allowance for Alsace-Lorraine. 15/ Totals for 4 zones of occupation. 16/ Official statistics; may be an underestimate of actual numbers. 17/ Present territory. 18/ Present territory - excludes Southern Dobrudja. 19/ Average for years 1930 - 1939. 20/ Not strictly comparable with later years, due to territorial changes. 21/ Data include only number taxed. 22/ Includes China-Proper (22 provinces) Manchuria, Jehol, and Sinkiang (Turkestan). 23/ Census, January 1, 1939. 24/ Includes estimates for Outer Mangolia. 25/ June.

WORLD APPLE AND PEAR CROPS LARGER THAN LAST YEAR

Apples

The 1947-48 world apple crop is estimated at 438 million bushels, about 2 percent more than the 431 million estimated for the preceding crop but 12 percent less than the prewar (1935-39) average of 499 million bushels.

North America: The crop in North America of 129.4 million bushels is 8 percent below the crop of the previous season of 140.8 million and 10 percent below the 5-year (1935-39) average of 143.1 million bushels. The crop in the United States is now estimated at 112.5 million bushels, 6 percent below the previous crop of 119.4 million. Production was about a fifth below average in the eastern states, about average in the central states and nearly a fifth above average in the western. The Canadian crop of 15 million bushels is about 4 million less than the bumper crop of 19 million produced in 1946-47 but about 300 thousand bushels less than the 5-year (1935-39) average of 14.6 million. Production in Mexico, estimated at 2 million bushels, is about the same as last season, but an increase of a million bushels over the 1935-39 average.

Europe: The apple crop in Europe is now estimated at 272.5 million bushels, as compared with 256.1 million for the previous season, and 320.7 million for the 5-year (1935-39) average. The Belgian crop, estimated at 11.5 million bushels, is 5 times larger than that of last year and double that of the 5-year (1935-39) average. The large crop in 1947 is attributed to the rest the trees had in 1946, to ideal weather during flowering of trees, and to destruction of insects as a result of the severe winter of 1946-47. Production of apples (dessert and cooking) in France is about the same as last season. Apples for cider, estimated at 66 million bushels, are about 5 million less than for the previous year, and less than half of the 5-year (1935-39) average. Drought and extreme hot weather reduced the crop by causing much of the fruit to drop prematurely. The apple crop in Rumania, estimated at 2.8 million bushels, is about a third less than the 1946 crop of 4.1 million and only about one-half as large as the 5-year (1935-39) average of 5.3 million. The reduced crop resulted from cold weather in 1946 and frost in 1947. In Czechoslovakia the 1947 crop estimated at 9.9 million bushels is about the same as last year and nearly a million bushels more than the 5-year (1935-39) average. A much larger crop was anticipated but hot, dry winds, prevailing at the critical time of growth and development of the fruit, caused much of the green fruit to fall.

Asia: Production in the reporting countries of Asia is forecast at 12.9 million bushels, 18 percent below the crop in the previous year of 15.7 million and 31 percent below the 5-year (1935-39) average of 18.7 million.

Southern Hemisphere: The apple crop in Argentina is now estimated at 4.5 million bushels, as compared with 7.2 million last season and 1.4 million for the 5-year (1935-39) average. The reduced crop is a result of frost damage in October in the Rio Negro valley. In South Africa the crop is estimated at one million bushels, about the same as last year and the same as the 5-year (1935-39) average.

(Text continued on Page 258; tables follow)

APPLES AND PEARS: Production in specified countries, averages 1935-39 and 1940-44, annual 1944-47

Apples

Continent and country	Average 1935-39	Average 1940-44	1944	1945	1946	1947 a/
	1,000 bushels	1,000 bushels	1,000 bushels	1,000 bushels	1,000 bushels	1,000 bushels
North America:						
Canada	14,560	13,459	17,829	7,635	19,282	14,900
Mexico	1,231	1,831	1,790	1,856	2,067	2,021
United States	127,311	115,306	124,754	66,796	119,410	112,503
Total	143,102	130,596	144,373	76,287	140,759	129,424
Europe: b/						
Austria	13,386	8,809	13,908	10,000	28,448	25,000
Belgium	c/ 5,511	6,172	6,283	5,511	2,296	11,482
Bulgaria	c/ 1,064	3,556	4,919	3,569	2,900	3,500
Czechoslovakia	c/ 9,034	4,401	5,094	2,642	9,619	9,893
Denmark	c/ 2,314	4,593	5,190	4,409	7,440	7,500
Finland	c/ 1,023	1,187	1,120	1,075	1,750	1,800
France						
Dessert and Cooking	10,499	9,109	18,481	8,471	13,090	13,090
Cider	153,973	114,061	280,831	22,307	71,059	66,043
Germany	50,015	43,138	43,173	35,000	22,000	40,000
Greece	374	370	350	446	964	1,000
Hungary	c/ 2,531	1,148	1,330	689	919	2,104
Italy	13,107	15,010	14,701	13,705	13,616	16,259
Luxembourg						
Dessert and Cooking	193	350	710	260	390	500
Cider	93	124	310	130	150	300
Netherlands	c/ 3,631	c/ 4,048	4,134	3,628	5,236	8,267
Norway	1,080	798	468	311	1,495	1,500
Rumania	c/ 5,269	5,585	3,671	5,512	4,133	2,756
Spain	c/ 5,411	6,603	8,125	5,000	4,500	5,000
Sweden	4,770	3,809	3,215	4,455	4,960	5,052
Switzerland	16,452	25,353	32,150	11,941	29,854	15,340
United Kingdom						
Dessert and Cooking	10,597	13,831	15,675	12,073	16,688	25,000
Cider	3,427	3,256	6,146	1,330	5,997	3,400
Yugoslavia	6,913	10,480	9,400	8,151	-	-
Total d/	320,667	285,791	479,384	160,615	256,141	272,497
Total (excluding Cider d/	163,174	168,350	192,097	136,848	178,935	202,754
Asia:						
Lebanon	e/	c/ 229	487	597	643	689
Palestine	65	134	150	226	230	225
Syria	f/ 138	117	280	257	260	350
Turkey	5,126	3,773	3,514	4,096	3,229	2,788
China (4 Provinces)	2,500	2,400	2,500	2,000	2,200	2,000
Japan proper	7,624	10,372	8,262	4,807	5,821	4,309
Korea	3,220	5,469	4,500	2,700	3,300	2,500
Total	18,673	22,494	19,693	14,683	15,683	12,861

Continued -

APPLES AND PEARS: Production in specified countries, averages 1935-39 and 1940-44, annual 1944-47

Continent and country	Average 1935-39	Average 1940-44	1944	1945	1946	1947 a/
	1,000 bushels	1,000 bushels	1,000 bushels	1,000 bushels	1,000 bushels	1,000 bushels
South America:						
Argentina	1,400	6,135	8,478	8,162	7,173	4,461
Chile	1,025	591	600	575	700	750
Total	2,425	6,726	9,078	8,737	7,873	5,211
Africa:						
Union of South Africa	1,036	1,130	795	818	1,000	1,000
Oceania:						
Australia	10,435	11,508	10,468	14,164	7,750	14,000
New Zealand	2,961	2,309	2,111	2,702	1,841	2,765
Total	13,396	13,817	12,579	16,866	9,591	16,765
World Total d/	499,299	460,554	665,902	278,006	431,047	437,758
World Total (excluding Cider d/)	341,806	343,113	378,615	254,239	353,841	368,015

Pears

Continent and country	Average 1935-39	Average 1940-44	1944	1945	1946	1947 a/
North America:						
Canada	569	733	894	600	951	965
Mexico	331	508	580	601	661	617
United States	28,693	29,312	31,956	33,042	34,447	35,350
Total	29,593	30,553	33,430	34,243	36,059	36,932
Europe: b/						
Austria	c/ 6,366	c/ 4,269	8,514	3,500	9,714	9,000
Belgium	2,000	2,200	1,500	4,409	1,323	6,614
Bulgaria	c/ 580	1,637	2,222	1,684	2,600	3,000
Czechoslovakia	c/ 3,866"	701	1,086	496	3,635	3,621
Denmark	c/ 480	776	1,102	617	926	1,000
France						
Dessert and Cooking	1,760	2,888	4,762	3,454	5,908	6,305
Cider	21,776	13,267	39,479	3,486	11,105	10,321
Germany	15,984	15,686	22,701	15,400	9,400	14,000
Greece	c/ 865	850	1,000	1,000	1,168	1,200
Hungary	742	500	500	238	353	794
Italy	8,944	9,620	11,010	10,004	10,563	10,450
Luxembourg	100	111	212	83	147	250
Netherlands	c/ 1,488	c/ 2,469	2,205	3,439	3,219	6,614
Norway	174	137	131	148	299	300
Rumania	c/ 1,103	c/ 1,207	1,376	1,333	1,333	529
Spain	c/ 3,057	2,787	2,950	2,500	2,000	2,000
Sweden	1,063	771	1,102	750	1,323	1,102
Switzerland	7,037	12,654	16,314	8,818	14,109	14,557
United Kingdom						
Dessert and Cooking	782	1,338	1,053	1,474	1,080	1,680
Cider	237	349	515	251	430	358
Yugoslavia	2,685	4,500	3,500	3,412	-	-
Total d/	81,089	78,717	123,234	66,496	83,810	96,395
Total (excluding Cider d/)	59,076	65,101	83,240	62,759	72,275	85,716

APPLES AND PEARS: Production in specified countries, averages 1935-39 and 1940-44, annual 1944-47

Continent and country	Average 1935-39	Average 1940-44	1944	1945	1946	1947 a/
	1,000 bushels	1,000 bushels	1,000 bushels	1,000 bushels	1,000 bushels	1,000 bushels
Asia:						
Lebanon	e/	c/ 71	251	309	331	353
Palestine	16	c/ 10	10	15	15	15
Syria	f/ 31	28	57	53	66	66
Turkey	3,315	2,776	2,584	3,197	4,087	2,407
Japan	7,366	6,516	4,309	4,113	3,942	3,700
Korea	775	785	519	495	474	425
Total	11,503	10,186	7,730	8,182	8,915	6,966
South America:						
Argentina	2,443	5,332	5,186	6,063	4,725	3,482
Chile	c/ 105	58	100	100	110	120
Total	2,548	5,390	5,286	6,163	4,835	3,602
Africa:						
Union of South Africa	680	785	864	455	680	680
Oceania:						
Australia	2,467	2,714	2,922	2,673	2,800	3,200
New Zealand	328	352	365	368	369	389
Total	2,795	3,066	3,287	3,041	3,169	3,589
World total d/	128,208	128,697	173,831	118,580	137,468	148,164
World total (excluding Cider d/	106,195	115,081	133,837	114,843	125,933	137,485

Office of Foreign Agricultural Relations. Prepared or estimated on the basis of official statistics of foreign governments, reports of U.S. Foreign Service officer's, results of office research and other information. Harvests in Northern Hemisphere countries are for the year shown and are combined with the harvest in Southern Hemisphere countries of the following year.

Estimates in original units of approximately 1 bushel in the following countries: Australia, Canada, Chile, United States, New Zealand, and South Africa. In other countries original estimates, mostly in metric tons, converted to bushels of 48 lbs for apples and 50 lbs. for pears.

a/ Preliminary.

b/ Estimates for each country have been revised to coincide with present boundaries except as noted.

c/ Partly estimated.

d/ Estimates totals include allowance for missing data for countries shown.

e/ Included in Syria.

f/ Includes Lebanon.

COMMODITY DEVELOPMENTS

TROPICAL PRODUCTS

MEXICO'S COFFEE EXPORTS SLIGHTLY LOWER

Exports of green coffee from Mexico during 1947 of approximately 548,000 bags were slightly less than 1946 exports of 555,000 bags and the prewar averages of 599,000 bags. About 97 percent of the 1947 coffee exports were destined to the United States and 3 percent to Europe. In prewar years the United States' share was 62 percent and Europe's 38 percent.

No official estimate is available concerning the 1947-48 coffee crop, but weather conditions have been favorable. Official sources place the 1946-47 crop at 923,000 bags and the preceding year's at 948,000 bags. Production during the crop years 1935-36/1939-40 averaged 959,000 bags annually, and for 1940-41/1944-45, 904,000 bags. According to official data, coffee acreage in Mexico increased from 312,000 acres in 1940 to 334,500 acres in 1947. Domestic consumption is currently estimated at about 435,000 bags annually. Prewar consumption was about 325,000 - 350,000 bags.

MEXICO: Exports of green coffee, calendar year 1947 with comparisons

Destination	Average 1935-39	Average 1940-44	1945	1946 a/	1947 a/
	Bags	Bags	Bags	Bags	Bags
United States	369,406	477,591	595,201	526,528	528,414
Canada	496	397	-	5,833	-
Europe	228,747	3,268	26	21,065	19,315
Other	561	1,137	8	1,705	76
Total	599,210	482,393	595,235	555,131	547,805

Compiled from official sources and foreign service reports.
a/ Preliminary.

DOMINICAN CACAO CROP AVERAGE

According to trade sources, the 1947-48 main cacao crop in the Dominican Republic, harvesting of which begins in April, will approximate 42 million pounds. The winter, or mid-harvest, now terminated, amounted to about 13.5 million pounds, making a total 1947-48 outturn of about 55.5 million pounds, which is considered an average crop. The total 1946-47 production was 69.5 million pounds.

Exports of cacao beans during 1947 from the Dominican Republic reached a record high of 66,133,591 pounds, valued at $12,951,938. About 97 percent of the exports were destined to the United States. The remainder went to Cuba, Puerto Rico, the Netherlands and Switzerland.

A recent development of interest in the Dominican Republic was the sale of Chocolatera Sanchez, C. por A., to the Dominican Government. Decree No. 4993 of March 6, 1948, authorizes the issue of Government bonds up to the value of $2,750,000 to provide money for the purchase. Chocolatera Sanchez was organized early in 1947, principally for the manufacture of chocolate and cocoa products. Although the company has acquired necessary plant facilities and equipment, it has thus far confined its activities to the purchase and export of cacao beans.

GRAINS, GRAIN PRODUCTS AND FEEDS

BURMA RICE ACREAGE ESTIMATE RAISED

The 1947-48 area planted to rice in Burma is now estimated at 9,154,000 acres, an upward revision of 146,000 acres over the previous estimate, according to the final official forecast. The revised estimate shows an increase of 1,420,000 acres over the 1946-47 planted area, and 2,480,000 acres over the wartime low acreage of 6,673,000 acres (corresponding estimates) in 1945-46. The season as a whole was favorable for rice production.

Estimates now indicate a harvest of 270,500 million bushels (8,520 billion pounds milled) in 1947-48, a gain of 39 percent over 194,900,000 bushels (6,140 billion pounds) harvested the year before. Prewar average production was 348,500,000 bushels (10,980 billion pounds). Export supplies of rice and rice products, including bran, from the 1947-48 crop are estimated by Burman authorities at 3,580 million pounds, the largest since before the war. Prewar exports equalled 6,600 million pounds in terms of milled rice.

ECUADOR PRODUCES RECORD RICE CROP

A record rice crop was produced during 1947 in Ecuador. Production amounted to 8,945,000 bushels (262 million pounds milled) compared with the previous largest output of 8,098,000 bushels (237 million pounds) the year before. The harvest was more than double prewar average production of around 3,400,000 million bushels (100 million pounds).

A forecast of the May-August harvest is not yet available. The difficulty experienced in marketing the 1947 crop at satisfactory prices and tightness of credit for growers are believed by exporters to be factors which may have reduced the 1948 planted acreage to some extent. Weather conditions so far this season have been favorable in rice-growing areas.

Total exports during 1947 equalled 140,795,000 pounds compared with record exports of 147,928,000 pounds in the preceding year. Statistics showing 1947 exports by country of destination are now available only from January through October. During that period, Venezuela was the principal recipient, and India, a new market, was the second largest importer of Ecuadoran rice. On January 1, 1948, a surplus of nearly 50 million pounds, in addition to consumption needs until the new crop is harvested, remained available for export from the old crop.

(Table on following page)

ECUADOR: Rice exports by country, January-October 1947, with comparisons

Country of destination	Average 1937-1941	1944	1945	1946 a/	January -October a/ 1946	January -October a/ 1947
	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds
Cuba	2	88	55	46	45	3
Peru	13	29	0	0	0	0
Venezuela	6	17	4	17	16	49
Colombia	4	0	b/	2	0	12
Panama	2	2	b/	5	5	4
Jamaica	0	0	0	16	17	7
Philippines	0	0	0	38	18	0
India	0	0	0	0	0	19
Dominican Republic	0	0	0	0	0	5
Other countries	4	6	6	c/24	8	8
Total	31	142	65	148	109	107

Compiled from official statistics.
a/ Preliminary. b/ Less than 500,000 pounds. c/ Includes 6 million pounds to Mexico, and 5 million to Greece.

(Continued on Page 252)

LIVESTOCK AND ANIMAL PRODUCTS

CHILEAN WOOL MARKET OUTLOOK

The Chilean wool market is fairly strong with prices substantially above last season. Chile produces chiefly fine crossbreds with 56's predominating. Sales have recently been made at 47.5 to 50.5 cents a pound for good quality fleeces, baled f.o.b. Punta Arenas. Last season's prices were roughly 35-38 cents, or about 30 percent below the current price.

The export quota of raw wool for 1948 is provisionally set at 14 million pounds according to the Institute of Agricultural Economy. Actual shipments will depend on the quantities taken by the Central Chilean woolen mills.

Exports in the first 11 months of 1947 totaled 13 million pounds. Shipments to the United States totaled 4 million pounds against 12 million in 1946 and 23 million in 1945. Approximately 6 million pounds went to Europe in 1947 and 2 million pounds to the Soviet Union.

Before World War II only small quantities of Chilean wool came to this country. The bulk was shipped to the United Kingdom, with Germany next in importance. Shipments for the five years (1934-38) averaged 23 million pounds only about 200,000 pounds of which came to the United States, the remainder going to Europe.

More and more Chilean wool is being consumed by Chilean mills. Index figures of production in 1946 were 132.8 (base 1935-36 equals 100). The Sociedad Explotadora of Magallanes report that they sold 30 percent of their fine and low grade pieces to Central Chile in 1947 and expect this business to continue. This company produces roughly one-third of the Chilean output. Imports of fine merino wools, chiefly from Argentina, have also increased.

COTTON

COTTON-PRICE QUOTATIONS ON FOREIGN MARKETS

The following table shows certain cotton-price quotations on foreign markets, converted at current rates of exchange:

COTTON: Spot prices of certain foreign growths and qualities in specific markets

Market location, kind, and quality	Date 1948	Unit of weight	Unit of currency	Price in foreign currency	Equivalent U.S. cents per pound
Alexandria		Kantar			
Ashmouni, Good	3-25	99.05 lbs.	Tallari	90.50	75.51
Ashmouni, F.G.F.	"	"	"	83.50	69.67
Giza 7, Good	"	"	"	(not quoted)	
Giza 7, F.G.F.	"	"	"	(not quoted)	
Karnak, Good	"	"	"	105.00	87.61
Karnak, F.G.F.	"	"	"	(not quoted)	
Bombay		Candy			
Jarila, Fine	"	784 lbs.	Rupee	600.00	23.09
Broach, Fine	"	"	"	740.00	28.47
Sind American, Fine	"	"	"	(not quoted)	
Punjab " 289-F, Fine	"	"	"	(not quoted)	
Kampala, East African	"	"	"	(not available)	
Buenos Aires		Metric ton			
Type B	3-26	2204.6 lbs.	Peso	2,810.00	37.95
Lima		Sp. quintal			
Tanguis, Type 5	3-25	101.4 lbs.	Sol	*180.00	27.31
Pima, Type 1	"	"	"	(not quoted)	
Recife		Arroba			
Mata, Type 5	3-26	33.07 lbs.	Cruzeiro	140.00	23.03
Sertao, Type 5	"	"	"	155.00	25.50
Sao Paulo					
Sao Paulo, Type 5	"	"	"	171.50	28.22
Torreon		Sp. quintal			
Middling, 15/16"	"	101.4 lbs.	Peso	167.00	33.88

Compiled from weekly cables from representatives abroad.
* Nominal

GRAINS, GRAIN PRODUCTS AND FEEDS

(Continued from Page 251.)

FRANCE'S GRAIN ACREAGE LARGER

Grain acreage planted up to February 1 in France is considerably larger than at that date of 1947, but still somewhat smaller than the prewar level, according to official estimates. Present prospects point to a smaller total breadgrain acreage than that called for under established planting goals.

Wheat acreage seeded by February 1 was placed at 10.2 million acres, the largest acreage of recent years. The current estimate is about 48 percent above the small acreage of 6.7 million acres remaining at that date of 1947, after the severe damage sustained during the winter. It is, however, about 18 percent below the comparable figure for 1938. Additional seedings of alternative winter/spring varieties are expected to bring the total wheat area to about 11 million acres, whereas the goal called for a total acreage of 12.4 million acres.

Fall rye acreage on February 1 was placed at 1.2 million acres. Rye seeding was virtually completed by that date and little change is expected from the present level. Seedings, though 18 percent less than the established goal and 24 percent below 1938, were 22 percent larger than last year's acreage. Fall seeding of barley and oats are of minor importance, these being primarily spring crops.

Incentives for meeting acreage goals included assurances of tax reduction on land seeded to wheat and rye, also that official prices for the 1947-48 crop would be based on cost of production. Provision of ample supplies of seed wheat of alternative varieties at low prices was expected to favor late planting. It is believed that many farmers have waited to seed their wheat until the worst frost danger is past, remembering the heavy winter-kill of the past season.

The condition of fall-sown grain is generally excellent, according to recent reports, and if favorable weather continues, better than average yields may be expected in 1948.

FRANCE: Estimated acreage seeded as of February 1, 1948
with comparisons

Grain	Area seeded up to February 1		
	1938	1947 a/	1948
	1,000 acres	1,000 acres	1,000 acres
Wheat	12,447	6,693	10,165
Rye	1,600	994	1,216
Barley	480	306	451
Oats	2,250	881	1,383
Meslin	160	84	82
Mixed cereals	-	63	94
Total	16,937	9,021	13,391

From official sources.
a/ Estimated acreage remaining after heavy winter kill.

TOBACCO

BRAZIL'S 1947-48 TOBACCO PRODUCTION LARGE BUT EXPORTS CURTAILED

Brazil's 1947-48 tobacco crop is estimated by trade sources at 20 percent above 1946-47 production. Prices to growers are below those for the 1946-47 crop, stocks at export points are at record levels, but supplies held by domestic manufacturers are below stocks during recent years.

The 1947-48 crop is estimated by trade sources at 224,000,000 pounds as compared with the 1946-47 crop estimated by the same sources at 187,000,000 pounds. Official estimates by the Brazilian Ministry of Agriculture for the 1946-47 crop, however, show a production of 224,000,000 pounds. Estimates from trade sources for 1946-47 and 1947-48 of areas and productions by states are as follows:

State and Type	1946-47		1947-48	
	Thousand Acres	Million Pounds	Thousand Acres	Million Pounds
Rio Grande do Sul				
Flue-cured	26.7	31.5	32.6	39.7
Air-cured	30.0	28.2	45.9	74.4
Santa Catarina				
Flue-cured	.9	1.2	1.7	1.7
Air-cured	6.2	7.5	5.1	6.6
Bahia	68.0	51.4	74.1	35.7
Minas Gerais	82.6	29.1	84.0	28.6
Other states	74.3	38.3	76.6	37.5
Total	288.7	187.2	320.0	224.2

The increased 1947-48 production resulted from an increase in acreage and more favorable growing conditions in most districts, which resulted in somewhat higher yields per acre than were obtained in 1946-47. Larger acreage resulted from high prices for the 1946-47 crop.

Prices to growers for 1947-48 crop flue-cured leaf have been announced by the principal domestic buyer and are approximately 10 percent below prices for the 1946-47 crop. The Organization has not announced prices for air-cured types but it is anticipated that they will also show a decrease from the high level for last year. Prices in Bahai for the crop years 1943-44 through 1947-48 are estimated as follows:

Crop	Cr$ per 15 kilo Paid to Farmer	Per arroba Delivered in Bahia	US$ per 75 Kilo bale For export f.o.b. Bahia to Spain
1943-44	45	50	28
1944-45	52-60	75	35
1945-46	60-90	83-90	30-32
1946-47	80-130	120-140	32-34
1947-48	50-75	70-100	33.50

Lower prices for the 1947-48 crop have resulted primarily from curtailed exports caused by exchange difficulties. There have been no export sales during recent months in Porto Alegre and exporters of Southern Brazil tobacco are pessimistic regarding shipments from the 1947-48 crop. Exports from Bahia have also been curtailed. Leaf stocks in the Port of Bahia at the end of December 1947 totaled 34,900,000 pounds as compared with 25,500,000 pounds on December 31, 1946.

Exports from Brazil in 1947 totaled 87 000,000 pounds as compared with the record 1946 exports of 117,000,000 pounds. Unless there is a material improvement in the exchange situation it is believed that 1948 exports will be substantially below those of 1947 and may not exceed the prewar 1935-39 average of 71,000,000 pounds.

FRANCE HAS RECORD 1947 TOBACCO CROP; CONSUMPTION INCREASED, BUT IMPORTS CURTAILED

France's 1947 tobacco crop is estimated at about 14 percent above the record 1946 crop. Current consumption of products are at a near record level but imports have been curtailed.

The 1947 crop, which is now being delivered to the government monopoly, is estimated at 103,000,000 pounds, farm sales weight, as compared with the previous record 1946 crop of 90,000,000 pounds. The increased production during the past two years resulted from higher acreages, which have occurred as a result of increased prices to growers. Yields have been below the prewar level due to shortages in fertilizer. Present indications are that 1948 plantings will total somewhat below the 1947 acreage. Prices for the 1947 crop, though high, did not yield returns to growers comparable with returns from certain other crops, with the result that some producers are expected to shift from tobacco to other crops in 1948. Favorable weather conditions and increased supplies of fertilizers, however, could offset a decrease in acreage and the 1948 production might compare favorably with the record 1947 crop.

Consumption of leaf in 1947 (storage order weight) totaled approximately 126,000,000 pounds as compared with the 1939 record consumption of 157,000,000 pounds. Sales of products in December 1947 were approximately 20 percent above the corresponding month of 1946 and present indications are that leaf used in the manufacture of products during 1948 will total approximately 150,000,000 pounds. If present exchange difficulties continue most of the leaf used in 1948 will come from January 1 stocks and 1947 domestic production, and carry-over supplies for January 1, 1949, will be substantially below January 1, 1948, stocks.

Preliminary data show 1947 import of 68,000,000 pounds as compared with the relatively high 1946 import of 82,000,000 pounds. Imports during the prewar years 1935-39 averaged 59,000,000 pounds. Imports in 1947 by sources of origin were as follows:

Country	Million pounds	Country	Million pounds
Algeria	15.0	Colombia	4.3
Brazil	14.9	Paraguay	4.2
United States	13.6	Madagascar	3.1
Dominican Republic	11.6	Others	1.8
		Total	68.5

FATS AND OILS

FRANCE'S OILSEED SHORTAGE RETARDS CRUSHING AND SOAP INDUSTRIES

The vegetable oil mills and the soap manufactures of Marseille, France, have been seriously retarded in their operations by a shortage of raw materials. This in turn has adversely affected the economic life of the city since its prosperity depends greatly on the prosperity of these two industries.

Marseille's vegetable oil industry is the principal processing industry in the city and is also the largest of its kind centered in one area in France, the total outturn accounting for a little more than half of the vegetable oil production in France. An important soap manufacturing industry has developed as a result of the availability of by-products of oilseed processing.

One of the reasons for the location of producers in this city is the fact that a large part of the raw materials which are received from the French and British Colonies are imported through the port of Marseille. There are about 22 factories manufacturing oil in this city.

The oil produced is derived from peanuts, palm nuts, copra, shea nuts, soybeans, castor-beans, flaxseed, bassia, and sesame. Before the war, about one half of these imports were received from the French Colonies, the other half coming from India, British African Colonies, Argentina, Ceylon, the Philippines and other countries of the Far East. The importance of foreign exchange in this industry is evidenced by the fact that in 1938, 193,000 short tons of peanuts and 88,000 tons of copra were imported from India and Mozambique. Since the war, producers have been cut off from the raw materials of the British Colonies and have been forced to depend more and more on the production of French Colonies.

FRANCE (Marseille): Oilseed imports and vegetable oil prices, 1947 with comparisons

Raw material	Imports			Prices of oil produced - 1938 a/	
	1938	1946	1947		
	Short tons	Short tons	Short tons	Francs per 100 kilos	Cents per pounds
Soybeans	-	22,948	7,430	-	-
Palm nuts	42,990	35,568	41,946	320	5.87
Copra	154,322	26,000	120,269	320	5.87
Shea nuts	2,976	9,540	2,425	-	-
Castor-beans	19,400	3,128	5,152	520	9.54
Flaxseed	4,630	1,595	794	405	7.43
Sesame seed	794	866	1,058	-	-
Bassia	-	-	211	-	-
Peanuts					
Unshelled	137,031	-	-	b/ 490	8.99
Shelled	316,443	112,599	119,514	c/ 395	7.25

Compiled from official sources.
a/Prices are now fixed at 8,000 francs per 100 kilograms (16.95 cents per pound) for all types of edible oil, and 7,500 francs (15.89 cents) for industrial oil. b/Refined oil. c/Unrefined oil.

In addition to oilseeds imported into Marseille, approximately 22,400 tons of oil cake were imported in 1946. Since the extraction process in the colonies is not as efficient as in France, the oil cake already treated in the colonies is again processed in France. This yields an oil cake suitable for animal feed and a certain quantity of vegetable oil. Before the war, oil cake was not imported into France, and the colonies disposed of it as they wished. Now, in view of the general shortage of fats and oils, this material is carefully treated.

The shortage of raw materials is eased only slightly by oilseeds produced in France. Producing regions are located largely in the Northern part of the country where approximately 38,000 tons of rapeseed and sunflower seed are grown.

Vegetable oils are used for the preparation of pharmaceutical products, industrial and edible oils. Today, all phases of importation, distribution, processing, and marketing of oilseeds and oils are regulated by the Government. This strict Government control, labor costs, and maintenance of the plants are among the local problems which confront the industry, in addition to the general shortage of raw materials and the scarcity of foreign exchange. Moreover, the processors are unable to justify the importation, by official agencies, of large quantities of fats and oils which have already been processed while their industry operates at only about 30 percent of its prewar output and at about 20 percent of capacity.

The soap industry of Marseille is faced with the same problems as the vegetable oil industry. Only about 22,000 tons of soap were produced in the first half of 1947 as compared with a monthly output of about 13,000 tons before the war. Normally about half of French soap is manufactured in Marseille. The quality of soap nowproduced is very poor, and the monthly ration is only 100 grams compared with the estimated prewar average consumption of 500 grams per person per month.

The products of these two industries are in constant demand and they are capable of meeting this demand should the necessary raw materials become available. However, considering the many difficulties to be overcome, it does not seem likely that prewar conditions will be reached in the foreseeable future.

ITALIAN OILSEED CROPS HIGHEST ON RECORD

The Italian oilseed harvest of 1947 appears to have been the largest on record. Most of the oilseed crops were increased substantially during the war years and continued to expand through 1947. Preliminary reports of anticipated acreage for 1948, however, indicates reduced oilseed plantings.

Rapeseed production in 1947 amounted to 23,000 tons from 51,000 acres, an increase of 102 percent over the previous record attained in 1946 and more than 10 times greater than the prewar average. Fall rapeseed plantings for 1948 harvest have not been reported, but spring acreage is expected to drop from 51,000 in 1947 to less than 20,000 for the current year.

Almost 8,000 tons of peanuts, the record high, were produced in 1947 from 11,000 acres, compared with the previous record of 4,900 in 1945 and the prewar average of only 1,600 tons. A decrease to only 9,000 acres is forecast for 1948.

The sunflower-seed crop of 12,000 tons from 24,000 acres exceeded that of a year ago by 85 percent. The war years brought the greatest expansion to this crop which increased from the 1935-39 average output of only 25 tons to 18,000 tons in 1944. Plantings are expected to drop from 24,000 acres in 1947 to less than 15,000 this year.

Over 4,000 tons of castor-beans were produced in 1947 compared with less than 2,000 in 1946. During 1940-43, however, the output averaged 9,600 tons. An acreage decline from 8,000 in 1947 to 5,000 is forecast for 1948.

Though of minor importance, the sesame and soybean crops also reached new records in 1947, amounting to 700 and 150 tons, respectively. It is likewise believed that the 1948 plantings will drop to 2,000 and 1,700 acres from 2,500 and 2,900 in 1947.

ITALY: Oilseed acreage and production, 1947 with comparisons

Oilseed	Average 1935-39	1945	1946	1947 a/
	Acres	Acres	Acres	Acres
Acreage				
Rapeseed	b/ 4,863	c/	26,116	51,342
Peanuts	b/ 1,621	6,654	6,889	11,275
Sunflower seed	b/ 52	25,226	16,286	24,369
Sesame seed	b/ 1,098	1,362	1,354	2,533
Soybeans	b/ 44	837	695	2,905
Castor-beans	b/ 18,804	5,812	3,474	8,273
Production				
	Short tons	Short tons	Short tons	Short tons
Rapeseed	b/ 2,183	7,942	11,351	22,908
Peanuts	b/ 1,642	4,854	4,448	7,935
Sunflower seed	b/ 25	7,165	6,670	12,350
Sesame seed	b/ 444	244	308	723
Soybeans d/	b/ 1	32	27	150
Castor-beans	b/ 3,597	2,634	1,678	4,683

Compiled from official sources. a/ Preliminary. b/ Average of less than 5 years. c/ Not available. d/ 1,000 bushels.

WORLD APPLE AND PEAR CROPS LARGER THAN LAST YEAR

(Continued from Page 245)

Pears

The world production of pears is now indicated to be 148.2 million bushels, 8 percent more than the crop of 137.5 million bushels produced in the previous year and 16 percent above the 5-year (1935-39) average of 128.2 million.

North America: Pear production in North America is now indicated to be 37 million bushels, as compared with 36 million in the previous crop and about 30 million for the prewar average. In the United States the pear crop is estimated at 35.4 million bushels, 3 percent above the 1946-47 crop and 23 percent above the 5-year (1935-39) average of 28.7 million. This is a record large crop for the third successive year. Pear production in Canada of about a million bushels, is 2 percent more than the preceding season. Mexico's production of 617 thousand bushels is about the same as last season, but twice as much as the 5-year (1935-39) average of 331 thousand bushels.

Europe: Production of pears in Europe is indicated to be about 96.4 million bushels. This is 15 percent above the 83.8 million produced the preceding season and 19 percent more than the 81.1 million produced prewar. A record crop of 6.6 million bushels is estimated for Belgium. This compares with 1.3 million for 1946-47 and with 2.0 million for the 5-year (1935-39) average.

Asia: In Asia the crop is indicated to be around 7.0 million bushels, 1.9 million less than the preceding crop and 4.5 million less than the prewar average. In Turkey the crop is now estimated at 2.4 million, as compared with 4.1 million last year and 3.3 million prewar.

Southern Hemisphere: Argentina's crop, because of frost damage, is now indicated to be 3.5 million, as compared with 4.7 million bushels for the preceding season and 2.4 million prewar. The crop in Union of South Africa is estimated at 680 thousand bushels, the same as last year and prewar.

This is one of a series of regularly scheduled reports on world agricultural production, approved by the Office of Foreign Agricultural Relations Committee on Crop and Livestock Statistics. For this report, the Committee was composed of Joseph A. Becker, Chairman, Gustave Burmeister, and Ruth G. Tucker.

ECONOMIC DEVELOPMENTS

COMPLETE NATIONALIZATION OF WHOLESALE AGRICULTURAL TRADE IN YUGOSLAVIA

Under a decree issued February 11, 1948, private wholesale trade for farm products has been entirely prohibited in Yugoslavia. Actually almost all of these functions, including foreign trade, had already been absorbed by State agencies during the last three years.

Although private wholesalers may no longer operate, private shopkeepers and restaurant owners can still make purchases directly from producers, but only with special permission of the proper authorities. Likewise, after mandatory deliveries to the government, peasants are also free to sell surpluses directly to consumers who in turn may only purchase quantities necessary for their own requirements and may not resell. This decree continues the process of nationalization which has been underway in Yugoslavia since 1945. Almost all trade and industry are now in the hands of the government.

In farming proper, private operations still predominate, but with many production and marketing controls, such as mandatory crop deliveries to State agencies and required sowings for a number of crops. Collective farms are becoming increasingly important, although they account, as yet, for only a small part of total agricultural operations.

It is reported in the Yugoslav press that there were 783 collective farms in the country at the end of 1947 with 180,000 hectares (1 hectare equals 2.471 acres) of arable land, and 35,000 families. Most members of collectives have been drawn from the recipients of land under the land reform. The government is prompting and encouraging the organization of collectives and their number should increase steadily, although retarded by the individualism of the average peasant.